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DECEMBER 1990

Lodging Hospitality

THE MANAGEMENT MAGAZINE OF DEVELOPMENT, OPERATION AND MARKETING

1991

1991 ALMANAC

Volume Forty-Six
Number Twelve, December 1990

Lodging Hospitality

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TO FIND INFORMATION

DESIGN & DECOR

To keep your property updated, this section highlights firms that specialize in design and decor.

FRANCHISE, FINANCE & MANAGEMENT

If you're choosing a chain, this section features a brand-name breakdown.

FOOD & BEVERAGE

The challenge to turn food and beverage services into profit centers continues for competitive hoteliers. F&B suppliers featured here can help.

HOUSEKEEPING

"Your Secret Weapon" and "Employees Hold the Key to the 90s" explain the value of maintaining efficient housekeeping departments, and vendors offer products to make employees' jobs easier.

TECHNOLOGY

The latest technological breakthroughs, ideas for incorporating and tips on marketing with technology are the focal points of this section.

GUEST SERVICES

Trends that translate into guest satisfaction keep revenues high. See "Frequent Travelers Speak Out" and "Amenities: Here to Stay," and browse through this idea-packed section.

EQUIPMENT, SERVICES & SUPPLIERS

Effective equipment saves hoteliers money and simplifies operations. This section lists equipment suppliers and includes an "Index of Products and Services" and "Where to Buy Locally."

THE FORUM

WELCOME TO 1991

Welcome to the new improved 1991 *Lodging Hospitality* Almanac. In this year's edition, you'll find more information than ever before and a new, easier-to-use format that will help you find the data you need to run your business and make strategic decisions throughout 1991.

The Table of Contents (page 4) is a helpful guide to the various sections of the Almanac. I'd like to review the key components of the publication and how you can best use them to your advantage.

On page 8 is an index of the firms advertising in the Almanac. A calendar of all the important industry events in 1991 follows on page 11. The listings include contacts and phone numbers to obtain more information about specific events.

For the first time, this year's Almanac organizes most advertisements and editorial information in seven key subject categories: Design & Decor; Franchise, Finance, & Management; Food & Beverage; Housekeeping; Technology; Guest Services; and Equipment, Services & Suppliers. Each section has a hardcover divider for easy reference.

In each section, you'll find data, editorial research and stories relating to the issues covered by ads from companies offering these products and services.

The last divider precedes several sections that will help you cross-reference information on the more than 120 companies advertising in this edition of the Almanac. The Index of Products & Services recaps the product category listings for all advertisers. If you know the name of a product, but not the manufacturer, look in the Trade Name Index. It lists product names for advertisers.

Perhaps the most important section of the publication is Where to Buy Locally. Once you've decided to buy, or simply want more information, you can consult this section to find the best way to contact the advertiser company or companies offering the product or service you need. It includes corporate headquarters addresses, phones numbers and key contact persons, as well as the location and phone number of local branch offices or distributor locations.

This section of the Almanac concludes with the Lodging Industry Census, an up-to-date snapshot of the size and scope of the lodging industry, including breakdowns of the number of lodging properties and rooms in each state.

In the back of the Almanac are the Directory of Suppliers and Directory of Products & Services. The Directory of Suppliers lists all companies offering products and services to the lodging industry. Included are the company names, addresses and phone numbers. Almanac advertisers are listed in boldface for easy identification.

The Directory of Products & Services is an alphabetical listing of all the products and services—everything from access control systems to zero-plus services—that a lodging operator may need to specify or purchase in the coming year. Each category lists the companies that provide the product or service. Advertisers are boldfaced and include their addresses and phone numbers.

Be sure to check the back of the publication for a selection of current classified ads. These include a variety of listings for employment opportunities, business and professional services and real estate notices.

I hope you find this year's edition of the Almanac to be as complete and helpful as possible. If you have any questions or comments about the Almanac, please call or write and we'll consider ways of improving this important reference publication. Contact me at *Lodging Hospitality*, 1100 Superior Ave., Cleveland, OH 44114. My phone is 216/696-7000.

I hope you all have a satisfying and profitable 1991. LH

EDWARD WATKINS IS EDITOR OF LODGING HOSPITALITY

Lodging Hospitality

A PENTON PUBLICATION

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SO WHAT'S NOT TO LIKE?

Frequent travelers sound off on the small pleasures—and the many peeves—of hotel guestroom design.

BY CARLO WOLFF
ASSOCIATE EDITOR

The weary traveler likes a hotel room with a comfortable chair, a roomy bed and a television on a stand, according to a guestroom-design survey of some 200 frequent travelers.

There's not too much consistency in what such travelers prefer; for example, most enjoy either an easy chair or a recliner/rocker, while few feel comfortable in a straight-back chair.

One man said he prefers a king-size bed "if with wife," two queen-size beds "when with wife" and, in other cases, a double bed.

Only one person responded with a terse "none" when asked to list dislikes. Otherwise, the dislikes came through loud and clear. So did the bottom line.

Don't expect the frequent traveler to forget that bottom line when he or she stays in a hotel room. People may complain of noise, the size (or lack of it) of furniture, and fitful HVAC. But the bottom line, according to the survey, isn't money; it's sleep. Take this anonymous comment:

"A quiet, restful sleep is the most important thing I want from any hotel/motel room," says one traveler. "I am willing to pay extra for that!"

This traveler also lists as pet peeves noisy air-conditioning units, noisy plumbing and noise and vibration from the corridor and adjacent rooms.

Topping the list of other peeves, according to comments generated during the survey, are loud HVAC systems with ineffective controls; bad lighting; small bathrooms (and other cramped quarters); and the lack of safes and refrigerators.

People seem to want things spelled out. One frequent traveler doesn't like the fact that "telephone instructions aren't clear, and local TV stations aren't identified"; many complain about inadequate lighting; and taller people, in particular, consider the furniture and "living space" inadequate.

"If they put in a chair or sofa, it is the smallest size they can find," writes one traveler. "I am 6'2" and weigh 185 pounds, so items that amount to 'toy' furniture are worse than no furniture at all.

"Also, mirrors are set for people well under six feet tall, thus making them useless for anybody over six feet. If you are going to put a mirror or sink in a room, don't let it be the cause of a backache caused by stooping."

Many travelers groused about lack of work space and that ever-present hotel-room horror, the too-short telephone cord. One person complains that there aren't enough electrical outlets for computers, and those that are available aren't easy to reach. This person says the work surface should be within six feet of the AC outlet and the phone; a jack should be provided for a computer-modem connection, and decent lighting should be available next to or above the work surface.

In an attempt to clarify an often-shadowy subject, one female business traveler suggested that hoteliers crank up the illumination.

Her major complaint is "lack of light," she writes. "Usually, the light bulbs are of minimum wattage in the room itself, which makes any paper work difficult. Lack of sufficient light in the bathroom makes it difficult to apply makeup."

Several people suggested that the bathroom-shower configuration could bear scrutiny. "Open lavatory/bathroom areas are invariably placed near the door," writes one traveler. "This detracts from the warmth of a room. It reeks of 'cheap motel,' and some of the best hotels are designed this way. Why?"

Other, minor complaints include hangers attached to rings on a hang rod; loud vending machines too near the guestroom; and bathrooms with too-few towels or towels that aren't large enough.

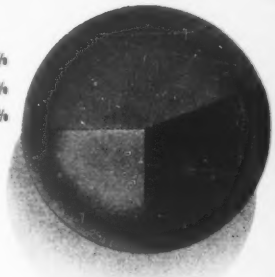
A few people complained of the design itself. "Long, narrow rooms are less appealing than more square rooms," writes one. "I also appreciate antique-style furniture to cold institutional types."

What kind of seating do guests prefer?

Easy chair	48%
Recliner/rocker	21%
No preference	15%
Straight-back chair	8%
Sofa bed	8%

What's the preferred kind of guestroom bedside lighting?

Table lamp	44%
Wall lamp	31%
No preference	24%

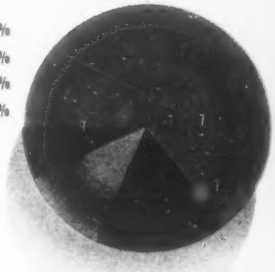


In what part of the room do guests want the TV?

No preference	33%
On a stand	29%
In an armoire	21%
On the dresser	17%

What type of alarm clock do guests prefer?

Bedside AM/FM clock radio	64%
Bedside alarm clock	17%
No preference	12%
AM/FM clock radio built into TV	7%

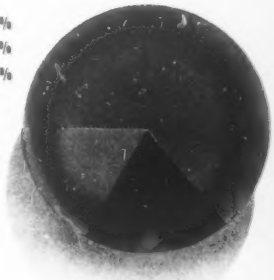


What kind of beds do guests prefer?

Queen size	44%
King size	41%
Double	10%
Twin	4%
No preference	2%

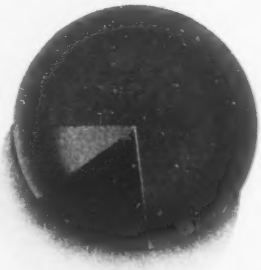
What window treatment do guests prefer?

Separate drape and blackout curtain	64%
No preference	19%
One-piece drape/blackout curtain	17%



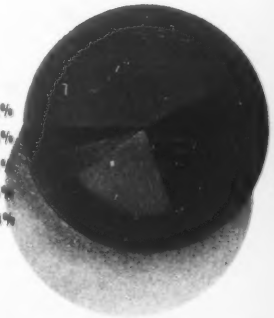
What kind of tub/shower arrangement do guests favor?

Tub/shower combination	73%
Separate shower only	17%
No preference	10%



How much extra per night would guests be willing to pay for a two-room suite rather than a single guestroom?

Nothing	42%
$10	28%
$20	21%
$30	5%
$5	4%



Source: Lodging Hospitality research

THE CHAIN REPORT

A restructured and slimmed-down Holiday Inns franchise network leads a reshuffled group of top lodging chains.

		Rooms	Number of Properties	Company Owned	Franchised/ Licensed	Management Contract	Other	Rooms	Number of Properties
1	**Holiday Inn Worldwide**								
	Atlanta, GA								
	Holiday Inn	257,661	1,349	111	1,238	0	0	43,224	189
	Holiday Inn Crowne Plaza	6,862	16	8	8	0	0	6,114	20
	Garden Court Holiday Inn	0	0	0	0	0	0	363	4
	TOTAL	**264,523**	**1,365**	**119**	**1,246**	**0**	**0**	**49,701**	**213**
2	**Best Western International**								
	Phoenix, AZ								
	Best Western	163,797	1,782	0	0	0	1,782	100,242	1,514
	TOTAL	**163,797**	**1,782**	**0**	**0**	**0**	**1,782**	**100,242**	**1,514**
3	**Marriott Hotels, Resorts & Suites**								
	Washington, DC								
	Marriott Hotels, Resorts & Suites	93,360	217	26	56	135	0	0	0
	Courtyard by Marriott	22,216	152	32	0	120	0	0	0
	Residence Inn by Marriott	18,186	152	50	1	1	0	0	0
	Fairfield Inn	6,872	54	54	0	0	0	0	0
	TOTAL	**140,634**	**575**	**162**	**57**	**256**	**0**	**0**	**0**
4	**Days Inns of America**								
	Atlanta, GA								
	Days Inn	124,586	948	0	948	28	0	756	7
	Days Hotel	7,418	34	0	34	0	0	592	3
	Days Suites	300	2	0	2	0	0	0	0
	Daystop	1,900	33	0	33	0	0	0	0
	TOTAL	**134,204**	**1,017**	**0**	**1,017**	**28**	**0**	**1,348**	**10**
5	**Quality International**								
	Silver Spring, MD								
	Sleep Inn	1,011	4	0	4	0	0	79	1
	Comfort Inn	55,917	612	2	610	0	0	1,487	23
	Quality Inn	46,776	356	7	349	0	0	8,283	136
	Clarion Hotels & Resorts	9,141	39	1	38	0	0	1,198	12
	TOTAL	**112,845**	**1,011**	**10**	**1,001**	**0**	**0**	**11,047**	**172**

		Rooms	Number of Properties	Company Owned	Franchised/ Licensed	Management Contract	Other	Rooms	Number of Properties
6	**Hilton Hotels Corp.**								
	Beverly Hills, CA								
	Hilton Hotels	40,032	45	13	0	45	0	0	0
	Hilton Inns	51,524	210	0	210	0	0	0	0
	Hilton Suites	645	3	3	0	3	0	0	0
	CrestHil by Hilton	312	2	0	2	0	0	0	0
	Conrad Hotels	0	0	0	0	0	0	1,314	5
	TOTAL	**92,513**	**260**	**16**	**212**	**48**	**0**	**1,314**	**5**
7	**ITT Sheraton Corp.**								
	Boston, MA								
	Sheraton Hotels	50,656	136	0	99	37	0	39,284	102
	Sheraton Resorts	12,093	31	0	19	12	0	6,933	25
	Sheraton Inns	27,630	153	0	150	3	0	1,626	8
	Sheraton Suites	172	1	0	1	0	0	0	0
	TOTAL	**90,551**	**321**	**0**	**269**	**52**	**0**	**47,843**	**135**
8	**Ramada Franchise Systems**								
	Fairfield, NJ								
	Ramada Inn	61,570	412	0	412	0	0	0	0
	Ramada Hotel	17,639	71	0	71	0	0	0	0
	TOTAL	**79,209**	**483**	**0**	**483**	**0**	**0**	**0**	**0**
9	**Radisson Hotels International**								
	Minneapolis, MN								
	Radisson Hotels	55,400	182	0	125	27	30	5,304	19
	Colony Hotels & Resorts	9,200	47	0	0	0	47	0	0
	Country Inns by Carlson	1,100	13	0	12	1	0	0	0
	Movenpick	0	0	0	0	0	0	4,467	24
	TOTAL	**65,700**	**242**	**0**	**137**	**28**	**77**	**9,771**	**43**
10	**Motel 6**								
	Dallas, TX								
	Motel 6	61,525	536	536	0	0	0	0	0
	TOTAL	**61,525**	**536**	**536**	**0**	**0**	**0**	**0**	**0**
11	**Hyatt Hotels Corp.**								
	Chicago, IL								
	Hyatt Hotels & Resorts	55,486	105	0	0	105	0	18,215	51
	TOTAL	**55,486**	**105**	**0**	**0**	**105**	**0**	**18,215**	**51**
12	**Howard Johnson Franchise Systems, Inc.**								
	Fairfield, NJ								
	Howard Johnson Lodge	29,201	282	0	0	0	282	428	4
	Howard Johnson Hotel	15,970	97	0	0	0	97	1,639	10
	AmeriSuite	622	5	0	0	0	5	0	0
	Park Square Inns	626	3	0	0	0	3	0	0
	Howard Johnson Plaza-Hotel	5,554	29	0	0	0	29	150	1
	Howard Johnson Plaza-Suite	342	2	0	0	0	2	0	0
	Wellesley Inn	2,385	24	0	0	0	24	0	0
	Howard Johnson Suite	93	1	0	0	0	1	0	0
	TOTAL	**54,795**	**443**	**0**	**0**	**0**	**443**	**2,217**	**15**
13	**Promus Companies, Inc.**								
	Memphis, TN								
	Embassy Suites	24,173	99	7	40	52	0	0	0
	Hampton Inn	27,541	220	11	190	19	0	0	0
	Homewood Suite	901	11	9	2	0	0	0	0
	TOTAL	**52,615**	**330**	**27**	**232**	**71**	**0**	**0**	**0**
14	**Econo Lodges of America**								
	Charlotte, NC								
	Econo Lodge	46,000	592	0	592	7	0	0	0
	TOTAL	**46,000**	**592**	**0**	**592**	**7**	**0**	**0**	**0**
15	**Super 8 Motels**								
	Aberdeen, SD								
	Super 8 Motels	44,884	714	47	667	0	0	268	4
	TOTAL	**44,884**	**714**	**47**	**667**	**0**	**0**	**268**	**0**

		Rooms	Number of Properties	Company Owned	Franchised/ Licensed	Management Contract	Other	Rooms	Number of Properties
16	**Travelodge Inns, Hotels & Suites**								
	El Cajon, CA								
	Travelodge	34,054	431	45	260	146	0	5,750	56
	Hotels	0	0	0	0	0	0	21,993	216
	Exclusives	1,467	5	5	0	0	0	0	0
	Thriftlodge	120	2	0	0	0	0	0	0
	Welcome Lodge	0	0	0	0	0	0	401	4
	TOTAL	**35,641**	**438**	**50**	**260**	**146**	**0**	**28,144**	**276**
17	**La Quinta Motor Inns**								
	San Antonio, TX								
	La Quinta	25,776	203	139	6	58	0	0	0
	Rodeway	441	2	2	0	0	0	0	0
	Days Inn	115	1	1	0	0	0	0	0
	TOTAL	**26,332**	**206**	**142**	**6**	**58**	**0**	**0**	**0**
18	**Hospitality International**								
	Atlanta, GA								
	Red Carpet Inns	12,800	127	0	127	0	0	170	2
	Scottish Inns	10,016	152	0	152	0	0	84	1
	Master Host Inns	2,530	18	0	18	0	0	0	0
	TOTAL	**25,346**	**297**	**0**	**297**	**0**	**0**	**254**	**3**
19	**Red Roof Inns**								
	Hilliard, OH								
	Red Roof Inns	22,803	205	205	0	0	0	0	0
	TOTAL	**22,803**	**205**	**205**	**0**	**0**	**0**	**0**	**0**
20	**Westin Hotels & Resorts**								
	Seattle, WA								
	Westin Hotels & Resorts	20,903	34	34	0	34	0	13,502	29
	TOTAL	**20,903**	**34**	**34**	**0**	**34**	**0**	**13,502**	**29**
21	**Knights Lodging System**								
	Columbus, OH								
	Knights Inn	17,970	162	111	51	108	0	0	0
	Knights Court	350	3	0	3	0	0	0	0
	Knights Stop	38	1	0	1	0	0	0	0
	Aborgate Inn	2,387	31	13	18	16	0	0	0
	TOTAL	**20,745**	**197**	**124**	**73**	**124**	**0**	**0**	**0**
22	**Treadway Inns Partners**								
	Montvale, NJ								
	Treadway	4,000	90	0	0	0	90	1,000	30
	IINNS	14,000	360	0	0	0	360	1,000	20
	TOTAL	**18,000**	**450**	**0**	**0**	**0**	**450**	**2,000**	**50**
23	**MetHotels**								
	Phoenix, AZ								
	Doubletree	11,424	35	10	1	34	0	0	0
	Compri	4,633	25	6	19	8	0	0	0
	Other brands	725	4	0	0	4	0	0	0
	TOTAL	**16,782**	**64**	**16**	**20**	**46**	**0**	**0**	**0**
24	**Park Inns International**								
	Irving, TX								
	Park Inn International	13,200	80	0	79	1	0	0	0
	Park Plaza	3,200	8	0	6	2	0	600	2
	TOTAL	**16,400**	**88**	**0**	**85**	**3**	**0**	**600**	**2**
25	**Rodeway Inns International**								
	Fairfield, NJ								
	Rodeway Inn	15,673	140	0	140	0	0	307	2
	TOTAL	**15,673**	**140**	**0**	**140**	**0**	**0**	**307**	**2**
26	**Preferred Hotels & Resorts Worldwide**								
	Oakbrook Terrace, IL								
	Preferred Hotels & Resorts	14,000	57	0	0	0	57	11,350	39
	TOTAL	**14,000**	**57**	**0**	**0**	**0**	**57**	**11,350**	**39**

		Rooms	Number of Properties	Company Owned	Franchised/ Licensed	Management Contract	Other	Rooms	Number of Properties
27	**Stouffer Hotel Co.**								
	Cleveland, OH								
	Stouffer Hotels & Resorts	13,880	34	7	0	10	17	0	0
	Stouffer Presidente Hotels & Resorts	0	0	0	0	0	0	2,295	7
	TOTAL	**13,880**	**34**	**7**	**0**	**10**	**17**	**2,295**	**7**
28	**Red Lion Hotels & Inns**								
	Vancouver, WA								
	Red Lion	13,479	57	39	0	1	17	0	0
	TOTAL	**13,479**	**57**	**39**	**0**	**1**	**17**	**0**	**0**
29	**Omni Hotels**								
	Hampton, HN								
	Omni Hotels	13,467	34	9	13	21	2	2,597	6
	TOTAL	**13,467**	**34**	**9**	**13**	**21**	**2**	**2,597**	**6**
30	**Outrigger Hotels Hawaii**								
	Honolulu, HI								
	Outrigger Hotels Hawaii	7,576	24	14	0	8	2	0	0
	Royal Resorts	543	1	0	0	1	0	0	0
	Outrigger Lodging Services	1,044	6	1	0	5	0	0	0
	TOTAL	**9,163**	**31**	**15**	**0**	**14**	**2**	**0**	**0**
31	**Budgetel Inns**								
	Milwaukee, WI								
	Budgetel Inns	8,424	80	64	16	0	0	0	0
	TOTAL	**8,424**	**80**	**64**	**16**	**0**	**0**	**0**	**0**
32	**Budget Host Inns**								
	Ft. Worth, TX								
	Budget Host	8,191	207	0	0	0	207	242	6
	TOTAL	**8,191**	**207**	**0**	**0**	**0**	**207**	**242**	**6**
33	**National 9 Inns**								
	Salt Lake City, UT								
	National 9 Inn	8,100	153	4	149	0	0	0	0
	TOTAL	**8,100**	**153**	**4**	**149**	**0**	**0**	**0**	**0**
34	**Wyndham Hotels & Resorts**								
	Dallas, TX								
	Wyndham Hotels & Resorts	4,900	13	8	1	4	0	2,171	5
	Wyndham Garden Hotels	3,119	18	18	0	0	0	0	0
	TOTAL	**8,019**	**31**	**26**	**1**	**4**	**0**	**2,171**	**5**
35	**Allstar Inns**								
	Santa Barbara, CA								
	Allstar Inns	7,759	73	73	0	0	0	0	0
	TOTAL	**7,759**	**73**	**73**	**0**	**0**	**0**	**0**	**0**
36	**Motels of America**								
	San Diego, CA								
	Cricket Inn	2,193	17	17	0	0	0	0	0
	Orchard Inn	103	1	1	0	0	0	0	0
	Super 8	5,426	82	82	0	0	0	0	0
	TOTAL	**7,722**	**100**	**100**	**0**	**0**	**0**	**0**	**0**
37	**Aston Hotels & Resorts**								
	Honolulu, HI								
	Aston Hotels	2,966	14	4	0	8	2	411	4
	Aston Condominiums	4,400	17	0	0	17	0	0	0
	TOTAL	**7,366**	**31**	**4**	**0**	**25**	**2**	**411**	**4**
38	**Guest Quarters Suite Hotels**								
	Boston, MA								
	Guest Quarters Suite Hotels	6,912	30	9	0	21	0	0	0
	TOTAL	**6,912**	**30**	**9**	**0**	**21**	**0**	**0**	**0**

CAN F&B MAKE MONEY?

BY MEGAN ROWE
SENIOR EDITOR

Flying in the face of conventional wisdom, many hotels say they profit from foodservice.

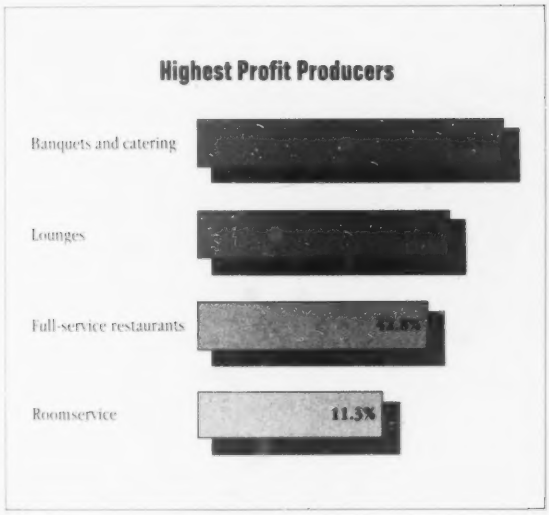
Pity the poor food and beverage department. While for many hotels it represents an important source of revenue, it has a reputation for being a cash drain, a headache, a necessary evil. "Show us a property with no foodservice," many challenge, "and we'll show you a property that runs itself and makes bundles of money." That kind of thinking has kept the trend toward limited-service lodging alive.

But if a sample of *Lodging Hospitality* readers is to be believed, the vast majority of lodging food and beverage departments really do make money. More than three-fourths of the F&B directors we surveyed say their departments are profitable, 13.3 percent say they lose money and 10 percent say they break even.

These figures reflect the responses of 90 lodging F&B directors from a sample of 500. These results may show some bias: After all, anyone is more likely to brag about success than admit to failure. In addition, F&B directors may figure their costs differently than a hotel controller.

Despite these positive reports, it's easy to see how F&B has earned its negative reputation: Robert Patterson, national coordinator of foodservice consulting for Laventhol & Horwath, says F&B departments across the board produce about a 16-percent profit, versus 70-75 percent for rooms departments. But those figures don't take into account unallocated operating expenses, such as marketing costs. If those expenses were charged proportionately to each department, "you'd find that you would probably need 20 percent or more departmental profit to really be making a profit on the bottom line," Patterson says.

What's more, L&H noted in 1987 that, although customers spend more in hotel restaurants, profits are lower than for their freestanding counterparts. In part, that disparity is blamed on roomservice, seasonal demand and larger staffs hotel foodservice operations must employ to offer full ser-



vice.

In addition, hotel F&B departments have no pressing need to be self-sufficient. "In a restaurant, there's nothing else to bail you out if you don't make a profit," Patterson notes, "whereas traditional hotel F&B has been looked at as a marginal contributor to profit."

F&B directors cite high labor costs as the greatest enemy of profit, with nearly two-thirds of those surveyed citing that factor. Next were lack of traffic through and insufficient promotion of the restaurants. Both are traditionally problems for hotel restaurant operations, given their need to serve a fluctuating customer base and their location—often a low-visibility site hidden within a hotel. Unless a restaurant has a reputation within the community, the only patrons it serves are hotel guests.

Despite that reputation, full-service restaurants often produce a profit—in fact, 8.3 percent of those responding say it is the *biggest* profit maker among their foodservice operations, and 34.5 percent say it has the second best profitability.

Despite those positive notes, banquets and catering remain by far the most successful F&B ventures. Three-fourths of our respondents named this service the best profit producer in their departments; another 21.4 percent named it second most profitable.

Lounges, long considered money makers because of high markup, have suffered in recent years because of stricter drunk-driving laws. Still, lounges are the most profitable F&B outlet for one-fifth of those responding, and 37.3 percent say they are the second-most profitable divisions.

Not surprisingly, roomservice does not make a great showing in the profit department. Only one hotel says roomservice is its biggest profit maker (what's their secret?), and 10 percent of those offering roomservice say it is second in profitability. Roomservice scores dead last in profitability, however, at 63.8 percent of the properties that offer it.

Several of the hotels that report a loss in F&B point out that everything on the property is subordinate to a casino. "Most F&B is a promotion to attract more gaming customers," one notes.

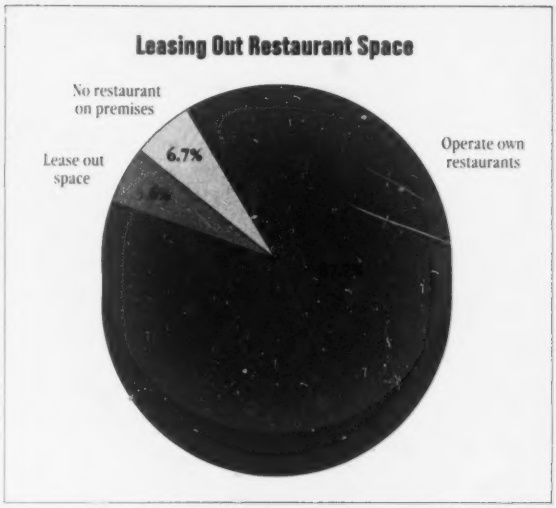
To combat some of the more costly aspects of operating an F&B department, many properties are turning to less labor-intensive offerings such as breakfast buffets and evening hospitality hours. Such services help control costs—managers can plan food expenditures and schedule workers more efficiently, so there is less waste and idle time—and the cost is built into the room rate.

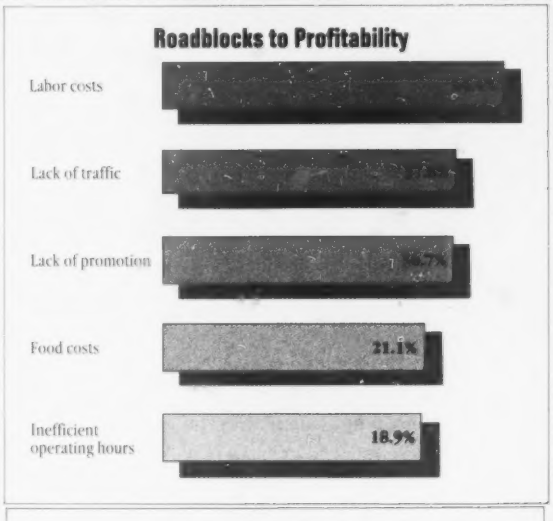
Not everyone buys the idea, though. Opinion on the merit of food giveaways was nearly split down the middle, with 47.8 approving and 41.1 percent disapproving.

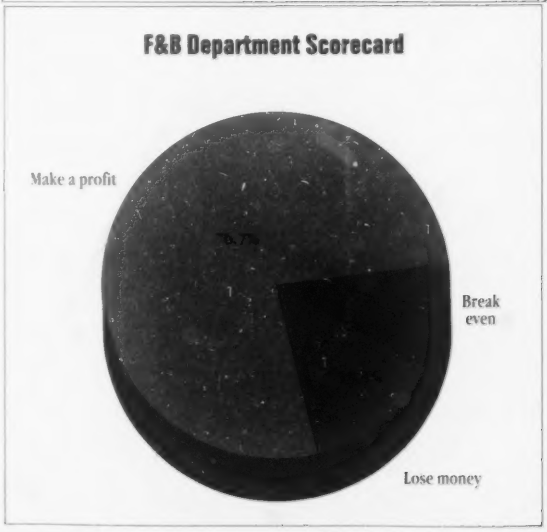
"This industry already gives away too much," one respondent writes. "Did you ever get a can of soup because you had to stand in line in the food store?"

Another alternative touted as a solution to restaurant operation headaches is the notion of leasing space to outside operators who specialize in foodservice operation. On paper, it might seem like a great idea: Let somebody else worry about feeding your guests. But in practice, judging from responses to our questions, it hasn't caught on. Nearly nine out of ten hotels in the survey—87.7 percent—operate their own restaurants, compared with only 5.6 percent that lease out the space.

F&B directors say they are trying a number of tactics to boost their departments' profitability. Many say marketing, advertising and promotion—both within and outside the hotel—are keys to improving business. Containment of food and labor costs is another popular solution. LH







EMPLOYEES HOLD KEY TO THE '90s

Readers share views on employee training and motivation, marketing programs and room rates for the new decade.

For an industry that prides itself in being people oriented, the lodging industry has become lax in the critical areas of employee retention and motivation. And, ironically, *Lodging Hospitality* readers predict that human resource issues will play a key role in determining the success or failure of hotels in the 1990s.

In a recent survey of *Lodging Hospitality* readers, 58 percent recognized that a shortage of workers, as well as the quality of help, are the biggest problems facing the industry this new year, bypassing overbuilding and foreign competition concerns. According to a 1989 survey (*PAYS AND PERKS, DOES LODGING FALL SHORT*, Oct. 1989), the industry has made some headway in employee retention. Salaries for hourly workers rose, paid vacations increased and some hotels even initiated retirement funds. But that's just the beginning.

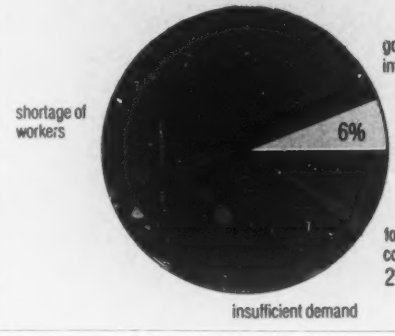
Linda Samilio, general manager of The Downtowner Inn in Erie, PA, has found that it takes more than just meeting cost of living raises to keep and motivate employees. "Our hourly employees are interwoven with our management staff," says Samilio. "We've created an environment where workers depend on each other.

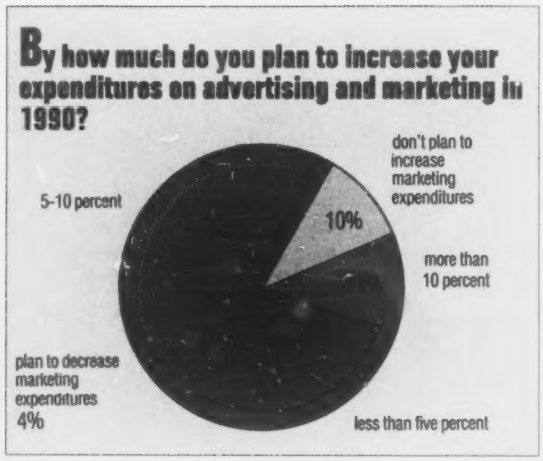
"Management can't sit on its title," she says. "It must get involved with its staff." Samilio feels she is a better manager after working in all phases of her hotel's operations. "When a housekeeper comes to me with a carpet cleaning problem I know what she's talking about because I have taken the time to clean carpets myself."

As we speak, hotel chains are vis-

"Our training will include a good deal of cross-training."—James R. Smith, CHA, general manager of Camelot Hotel.

What do you believe will be the biggest problem facing the lodging industry in 1990?




By how much do you plan to increase your expenditures on advertising and marketing in 1990?
don't plan to increase marketing expenditures
10%
5-10 percent
more than 10 percent
plan to decrease marketing expenditures
4%
less than five percent

iting college campuses with hopes of recruiting workers with industry training. "We are aware of labor shortages and must move quickly to retain as many qualified workers as possible,"

"Some MBAs are demanding higher salaries than hotels can accommodate."—Michael E. Trissler, assistant general manager of The Woods At Killington.

explains Stephen Marshall, executive assistant manager of the Four Seasons Hotel Boston.

To encourage employee interest, Michael E. Trissler, assistant manager of The Woods At Killington in Vermont, is giving employees without college degrees a chance. "Some MBAs are demanding higher salaries than hotels can accommodate," says Trissler. "So I'm moving some of my less-educated workers into those positions. They may not have masters degrees, but they are willing to learn and they realize the importance of servicing guests."

Service is a key word to the industry in the 1990s. "We've got to get back to the basics," says Samilio. "It's time to stop talking about service and really do something about it."

Consequently, 54 percent of respondents plan to spend five to 10 percent more on employee training this year. But they will strive to be cost efficient.

"Our training efforts will include a good deal of cross-training," says James R. Smith, CHA, general manager of Camelot Hotel in Tulsa, OK. "For example, if a bellman is not busy, he can take a room service order to a guest."

Experts say that spending money on additional employee training programs will have little bearing on room rate increases. On the contrary, good employees add to the overall perception of a hotel. And that perception can justify higher room rates, not force rate increases

Responding hoteliers are confident that room rates will continue to rise. Forty-five percent will raise room rates between five to 10 percent. But many factors will contribute to this increase besides the local and national economies.

"We are planning some remodeling on a room-for-room basis and will ask a higher rate on renovated rooms," explains Daivd Poé, assistant general manager of the Fairway Resort in McAllen, TX. "We won't get outrageous with rate hikes, though. We are doing very well with occupancy now and we don't want to outprice ourselves."

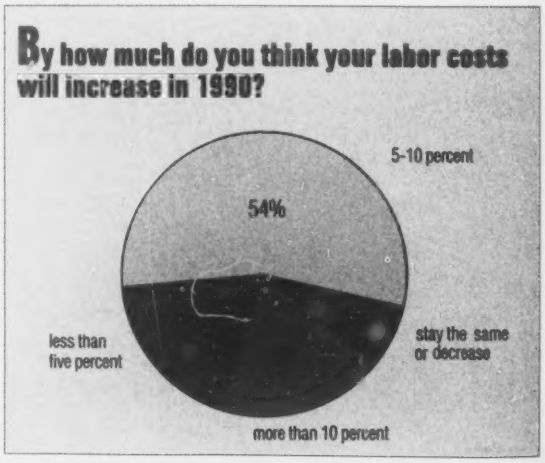
"Know your property," advises Camelot's Smith. "Some properties plan to raise rates 20 percent in the next few years. We probably won't go that high. Why? We know our market, they know theirs."

Getting the word out to potential guests that your property is number one in service is another challenge in the '90s. But with renovations, employee training and room rate competition, advertising and marketing budgets can only be stretched so far. And there are so many guests to target—business, vacation, senior and family travelers—to name a few, that some hotels will have difficulty pinning down a targeted campaign. Recognizing the need for advertising, however, forty percent of responding hoteliers say they'll increase marketing efforts between five and 10 percent this year.

Trissler (In The Woods) suggests starting with present guest lists and working from there. "We pride ourselves on consistent service and have a phenomenal number of repeat customers. We will concentrate on them in hopes of keeping their business and generating some word-of-mouth business as well." A quarterly newsletter keeps guests up-to-date on improved services and activities.

Other suggestions include tying food and beverage into hotel promotions, working with local convention centers and building a customer data base to discover guests needs.

"Be open minded," says Camelot's Smith. "We are going to work on gaining every piece of business, repeat or otherwise. The hotel business is down now. Some properties will stay down. But those that will succeed are the ones that change their thinking. The key for the '90s is treating your employees with respect and showering your customers with service." LH


By how much do you think your labor costs will increase in 1990?
5-10 percent
54%
less than five percent
stay the same or decrease
more than 10 percent

TECHNOLOGY AT YOUR SERVICE

Lodging technology isn't much good if it doesn't enhance guest service levels. The list of approaches is nearly endless.

BY EDWARD WATKINS
EDITOR

To be effective, lodging technology must either a) bring in more guests; b) reduce labor or other operational costs; or c) improve the levels of guest service. Most new technology available to lodging operators focuses on service enhancements. And, not coincidentally, guests are telling hoteliers that they want to be pampered.

Unlike hotels in the Far East and other labor-rich areas, properties in North America must provide added service with fewer, probably less-trained employees than they've had in the past. One cost-effective way to do so is with technology.

A recent poll conducted by *The Wall Street Journal* for Red Lion Hotels & Inns showed that frequent travelers want hoteliers to use more technology to ease the burdens of business travel. According to the study, travelers want hotels and other hospitality firms to adopt a wide range of innovations. Among the most desired are in-hotel computerized airline ticket dispensers, automatic baggage handling, voice mail and speedier check-in and check-out. (See chart on page 68.)

Red Lion is working with US West, its telecommunications vendor, to develop a number of telephone-based programs to increase service. Innovations under development by the two companies include voice-activated check-in and a credit card microchip that stores guest lodging preferences as well as credit information.

Business travelers want hotels to be their offices on the road. The more a property can do to make a guest's stay productive as well as comfortable, the better chance it has of building repeat business loyalty.

The more a property can do to make a guest's stay productive as well as comfortable, the better chance it has of building repeat business.

It's become nearly the norm for business hotels to provide adequate desks, seating, phone cords and lighting for guests who wish to work in their rooms. Likewise, even some budget chains now feature—and promote—two-line phones and jacks for computer modems for their business traveler guests.

Other properties offer additional technology services—from pagers and cellular phones for rent to voice mail and in-room fax machines—to satisfy the workaholic guest.

The Atlanta Marriott Gwinnett Place has gone one step further. Last October the 300-room suburban property equipped 11 of its guestrooms with IBM PS/2 Model 30 Personal Computers. The system, housed in an oak minibar-type cabinet, includes a color monitor, external drive, printer, three business software packages (Lotus 1-2-3, Supercalc 5, WordPerfect) and four game packages.

"We noticed that a lot of our weekday guests bring laptop computers with them, so we thought it would be a help to them if we equipped some rooms with PCs," says Kevin Ginn, director of marketing. "Our property is located in an office park with a high concentration of technology firms. We figure this kind of service separates us from the other hotels in the market."

The hotel charges guests $25 a night to use the equipment. A local firm, BAF Systems, Inc., installed the computers and performs maintenance and updates on the systems. BAF and the Marriott share the revenues.

Ginn says the hotel doesn't ad-

vertise the service, but "we sell the computer rooms through our reservations department. Our reservationists ask, 'Will you require a room with a computer?' just as they ask if guests want no-smoking rooms."

The hotel also promotes the rooms with a lobby display and key packet envelopes that include a pullout card with information on the service.

Ginn admits that response to the service has not been overwhelming. "It's not a big revenue generator, and it never will be. We break even and we're able to provide an amenity that none of our competitors can offer."

One unexpected benefit of the service: Ginn says an informal study showed that 80 percent of guests using the PCs order dinner through roomservice.

On-premises business centers are another way to help business travelers be more productive. Atlanta's Ramada Renaissance Hotel, for example, has teamed with Xerox Corp. to establish a business center in the 496-room property near Hartsfield International Airport.

Services available at the center include photocopying, fax messaging, packaging and shipping, secretarial, presentation and equipment rental. Office supplies are also on sale in the center.

Ramada Renaissance management decided to offer the services for several reasons. "First of all, our corporate business clientele has become more sophisticated and needs additional services when they stay at hotels," says Tony Fant, hotel manager. "Also, centralizing these services frees up our staff to perform their jobs. Previously, if a guest needed something copied, faxed or even typed, one of our secretaries would do it."

The hotel and Xerox share revenues from the center, which is open from 7 a.m. to 7 p.m. during the week and 7 a.m. to 1 p.m. on Saturdays. If a guest needs assistance after hours, "we just do it the old fashioned way," says Fant.

One Hong Kong hotel offers technology to guests that ties business center services to guestrooms. At the Kowloon Hotel, executive-class rooms feature a computer-like device and keyboard that guests can type telex or fax messages on and use as a word processor. Once messages or reports are complete, guests can transmit the documents to the business center for transmission or preparation.

The lodging industry has been experimenting with automated check-in and check-out systems for nearly a decade. Several types of systems (particularly for check-out) are in use in many business-class properties, but now the technology seems to be available on a practical basis for mid market and budget motels.

Both Motel 6 and Thriftlodge, Travelodge's new hard-budget concept, will soon test a completely automated drive-through night check-in system. Marketed by CapData—which also sells in-lobby check-in systems—the Night Express system operates much like a bank automated teller machine (ATM).

Guests can use credit cards or

What Kinds of Technology Do Guests Want?

% Mentioning	
43%	**Computerized ticket dispensers** and reservations systems that are personally accessible at every large hotel
41%	**Credit/debit and identification cards** that travelers use to gain access to a plane, select seats and to notify the waiting hotel staff that they are on the way or will be delayed
37%	**Baggage automatically delivered** from the guest's plane to his or her hotel room door, and on departure from the hotel to the plane
30%	**More personal contact/service**
25%	**Voice mail** message systems in guestrooms
24%	Hotels with all **guests' preferences noted at check-in,** so guests are assigned to the type of room they prefer and receive other services as desired
23%	**Television unit that's a multi-screen CRT** that can access hundreds of TV channels, access airline schedules, monitor fire and life safety systems, plus tell the guest who is at the door
23%	**Cellular phones** available at the hotel for guests to take with them to appointments
16%	Hotel check-out via **interactive television**
10%	Rooms equipped with **personal computers and modems**
3%	None of the above

Source: Red Lion Hotels & Inns/Wall Street Journal

In-room PCs make life on the road easier for business travelers.

cash and receive a printed receipt and room key once the transaction is complete. The system's screen can be programmed for several languages.

Night Express could allow properties to eliminate night desk clerks or to free them up for other duties. It can also be used to supplement front desk check-in during busy daytime periods. Thriftlodge's first property, which opened in January in Georgia, uses a drive-up window (as well as the traditional front desk) for check-in and check-out.

Perhaps the hottest area of guest-service technology in the lodging industry is instant airline ticketing. Several firms—such as Hoteleticket and Quick Delivery Airline Tickets (Q-DAT)—offer systems that enable guests to make airline reservations, flight changes or other travel arrangements from their guestroom telephones and then pick up the tickets almost immediately at the front desk.

Another firm, JafMar, Inc., installs ticketing machines in hotel lobbies and other public locations. Guests use the dispensers to get tickets after booking flights with a travel agency. The first of JafMar's Fastix machines was recently installed in the Parc Fifty Five Hotel in downtown San Francisco.

CapData offers ATM-like automated check-in systems for budget properties.

Resort and spa guests can experience computer makeovers from Perfect Image.

Satellite printing of airline tickets was made possible following a policy change several years ago by Airline Reporting Corp. (ARC), the organization that regulates airline ticketing. Late last year, ARC further ruled that such systems can receive reservations from multiple travel agencies. This now allows users to book flights through any travel agent as well as the 800-number reservations service offered by the system.

Chains such as Marriott, Sheraton and Hilton have made commitments to install this technology in many or all of their properties over the next few years.

The service is offered at no charge to the hotel if it can maintain a minimum volume of tickets (about 20 per month). Otherwise, the property pays a small monthly fee for the service. Guests are charged nothing, and travel agents receive their standard commissions when they book flights.

Technology can also be used to make the guest experience more relaxing and fun. Television-based in-room entertainment is certainly an industry standard, even in many midpriced and budget properties.

But some properties are now looking for ways to enhance this expected amenity with extra service. The 43-property Vagabond Inns chain, for example, will equip each of its guestrooms with a video cassette recorder (VCR). Tapes can be rented from a lobby machine. Cable TV with free movie channels also is provided in all properties.

Hilton Suites goes one step further in its three properties: each suite has a VCR, and the hotel loans movies *free* to guests. Movietel supplies the 150-movie inventory: 25 percent of the titles are updated each month. Hilton management reports that, on average, 75 percent of a property's movies are in use every night.

The upscale Portman Hotel in San Francisco charges guests for tapes ($8 to $10 per movie), but on-floor butlers deliver the movies to guestrooms.

Technology can also help guests enhance their appearance. Los Angeles-based Perfect Image will soon offer hotels, resorts, spas and cruise ships its computer-based imaging system. With the system, a technician comes to a guest's room, inputs the client's image into the computer and then simulates on the screen a range of possible cosmetic makeovers, including weight changes, hair color and style, cosmetic surgery, dental reconstruction, body contouring, color analysis and more.

"We've targeted hotels and resorts for this product based on market research," says Caradoc Ehrenhalt, vice president of marketing. "Customers are more inhibited if the system is in a hair salon. The customer may want to try a new nose, but because they are in a public place, they may only ask for a new hair style." LH

TECH TALK BACK

Reader response gives insight into the future direction of lodging technology at the property level.

BY ANNE COULTON
ASSISTANT EDITOR

Installing the appropriate technology systems at a property can streamline labor efforts and improve the guest experience. But hoteliers must walk a fine line between maximizing technology effectiveness and maintaining personalized service.

In the 1990s, lodging executives predict that technology will play an increasingly important role in the everyday functions of hotel operations and guest satisfaction.

An exclusive survey of *Lodging Hospitality* readers shows that they consider technology's impact on the guest experience to be its biggest advantage. Eighty-one percent of respondents say that the primary advantage of lodging technology systems is that they improve the guest's experience and satisfaction with their property.

Forty-three percent rate improved marketing and operating efficiencies as the biggest advantage of technology and 33 percent say that systems reduce operating costs (see chart). Only 14 percent say technology lowers labor costs.

Property management systems ranked number one as respondents' most recent technological addition to their hotels—43 percent listed a PMS as their property's newest technological installation. Thirty-eight percent say that a telephone/call accounting system was recently added to their hotel and ten percent acquired an in-room entertainment system (see

What are the major problems you encounter in adapting technology to your property?

76%	Difficulties in installation and training
19%	Inconvenience to guests
19%	Insufficient reductions in operating and labor costs
14%	Other

What new technologies have you acquired for your property in the last year?

43%	Property management system
38%	Telephone/call accounting system
10%	In-room entertainment system
5%	Energy management system
0%	Security/electronic locking system
19%	Other

chart).

The consensus among readers was that installation and training difficulties were the biggest problems caused by new systems--76 percent surveyed rated this area as problematic. Inconvenience to guests and insufficient reductions in operating and labor costs tied for the number two spot as negatives against technology (see chart).

Hotel managers responding to the survey say they would like to see more technological advances in a number of areas. Some suggestions include:

- centralized vacuum systems
- more universal/functional switchboards
- simplified data and backup storage
- electronic mail

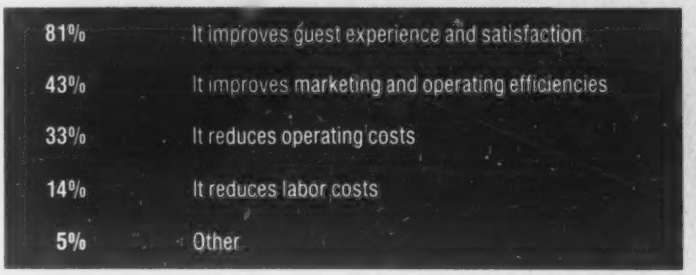
Looking Forward, a management perspective of lodging technology compiled by the American Hotel and Motel Association (AH&MA) and Andersen Consulting, Arthur Andersen & Co., reveals that lodging executives rank reservations systems as the most important technologically for hotels to acquire over the next five years (see chart).

The report divides technologies into those with an external focus—like reservations systems—and those with an internal focus—like property management systems. According to the report, reservations systems serve managers as a critical information-gathering tool to record guest data and help pinpoint market segments. Additionally, these systems are an effective vehicle for chains to use when competing in the franchise arena.

Based on the study, lodging executives foresee the role of the travel agent, aided by technology, gaining marketing momentum in generating future hotel business. But *Looking Forward* also advises managers to "take ownership" of technology and that development of applications should be driven by the user, not the vendor.

Fifty-four percent of lodging executives surveyed for *Looking Forward* viewed lack of management understanding as a barrier to the successful use of technology in the industry. Forty-one percent cited lack of cost effectiveness as the main technology roadblock. To maximize the benefits of technology, executives say managers should define property needs and application development plans before investing in a system.

What do you believe are the primary advantages of lodging technology systems?


81% It improves guest experience and satisfaction
43% It improves marketing and operating efficiencies
33% It reduces operating costs
14% It reduces labor costs
5% Other

In-wall data jacks were ranked by executives as the most important in-room technology, followed by video players, fax machines, room safes, modems and teleconferencing capability. The study advises that, while these amenities are not practical or necessary for each guestroom, they address the needs of business travelers and should be provided in public areas or select rooms.

Automated credit card check-in/check-out, business support centers, PC rentals and presentation/audio visual equipment were cited (in descending order) as technology also critical to public areas.

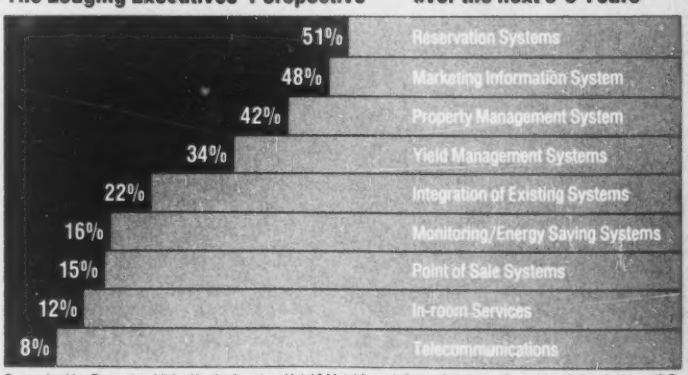
Another executive survey, this one compiled by Ernst & Young, reveals that 97 percent of hotel managers say the role of technology has increased at their property, but one-third believe the applications are not being used effectively.

The report also predicts that technology will continue to drive hotel profits by fine tuning property operations and that information management will become even more critical in the areas of accounting, reservations, point-of-sale reporting and yield management. It also advises that technology information management in the '90s will shift from the hands of systems professionals into those of senior lodging managers.

Of the Ernst & Young survey respondents who were dissatisfied with their management of information systems, 31 percent say that systems are too costly to change, 31 percent believe it is time consuming to change applications and 31 percent say they cannot get the right information to the right people. LH

The Lodging Executives' Perspective

Strategic Opportunities for Technology investment over the next 3-5 Years



Source: Looking Forward, published by the American Hotel & Motel Association and Andersen Consulting, Arthur Andersen & Co.

FREQUENT TRAVELERS SPEAK OUT

How do frequent travelers really feel about hotel selection and guestroom services?

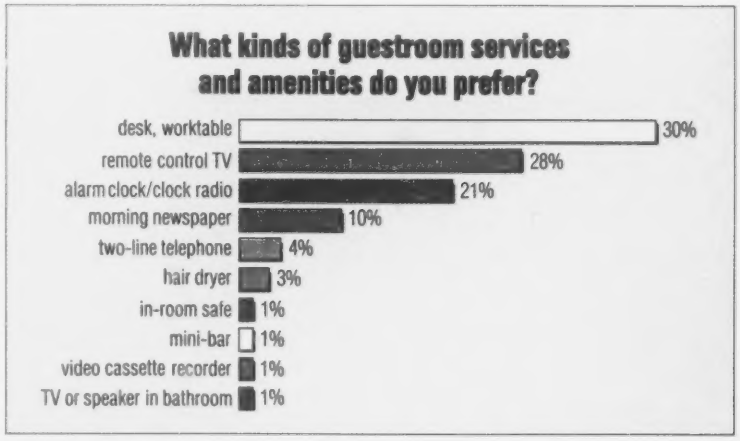
When matched against price, brand name, personal recommendation and frequent-traveler affiliation, location may still be the most competitive tool a hotel has to offer guests in the 1990s. Sixty percent of frequent travelers polled in an exclusive *Lodging Hospitality* survey say that location is number one on their list when selecting a hotel.

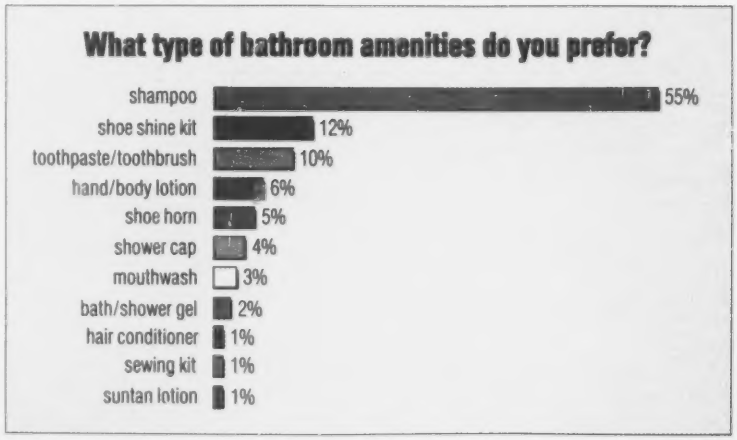
Price is another important factor when guests consider hotels. Twenty-one percent of the respondents feel price should be the first consideration. Furthermore, 64 percent say price is second only to location. Surprisingly, brand awareness is fairly low. Just six percent of the respondents worry about loyalty to brand name. However, 20 percent might consider hotel affiliation when making their selections, but only after location and price are identified.

Food and beverage facilities and room service are at the bottom of travelers' selection criteria list. Only eight percent of the travelers polled look into hotel food and beverage choices, while six percent question room service options.

When choosing a hotel room, many of today's corporate travelers prefer to make their own reservations. Fifty-one percent say they take care of the task themselves, while 30 percent rely on a secretary or assistant to handle the preparations. About 15 percent seek the assistance of a commercial travel agency, and three percent contact in-house travel departments.

Hotel guestrooms claim to offer all the conveniences of home. But our survey reveals that even though guests enjoy these added amenities—mini-bars, in-room safes, hair dryers and make-up mirrors—there are other amenities that hold


What kinds of guestroom services and amenities do you prefer?
desk, worktable 30%
remote control TV 28%
alarm clock/clock radio 21%
morning newspaper 10%
two-line telephone 4%
hair dryer 3%
in-room safe 1%
mini-bar 1%
video cassette recorder 1%
TV or speaker in bathroom 1%



greater importance.

The basic desk or worktable in a hotel room still holds the most value to travelers in our poll. Thirty percent of our participants place desks in their most-valued category of guestroom amenities.

Remote control televisions hold high regard to frequent travelers. Though desks ranked first in the survey, 28 percent would rather have a remote control TV than a work station. Seventy-five percent think enough of this technology to make it one of their top three choices. Fifty-nine percent appreciate an alarm clock or clock radio.

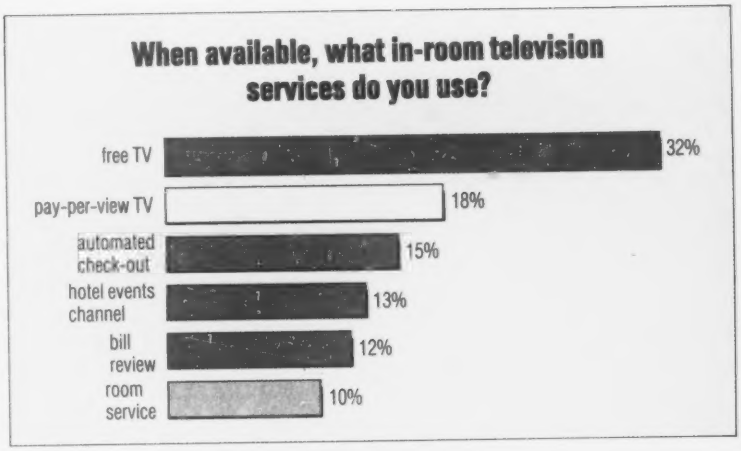
Gaining popularity in guestroom amenities is the morning newspaper. Ten percent find greater value in a complimentary morning newspaper than a desk or TV/remote. Low in guest essentials, however, are in-room safes, mini-bars and make-up mirrors. An average of just three percent find these amenities most helpful.

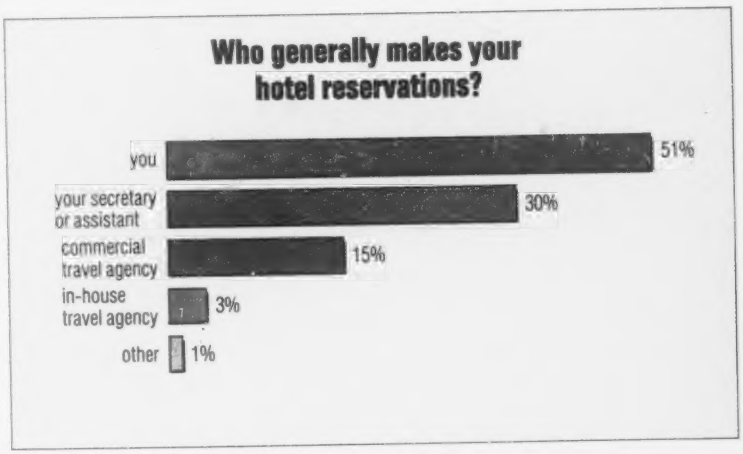
In the category of bathroom amenities, shampoo still tops the list. Fifty-five percent of guests in our survey find the greatest value in shampoo. Surprisingly, hand/body lotion (six percent), shoe horn (five percent), shower cap (three percent), hair conditioner (one percent) and sewing kit (one percent) all rank low in personal-care amenity preferences.

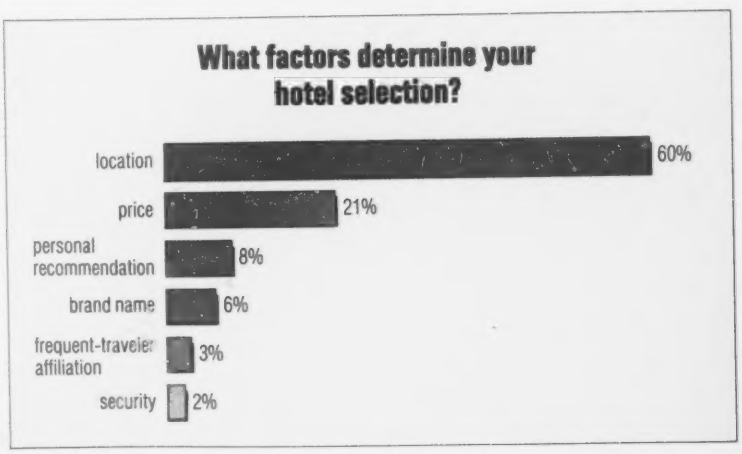
Twelve percent of frequent travelers polled believe shoe shine kits are a necessity in bathroom amenity packages. In fact, another 23 percent of those surveyed rank shoe shine kits as their second or third choices.

When choosing in-room television services, 35 percent of our polled travelers say free TV outweighs pay-per-view TV, automated check-out and other automated television services. Pay-per-view TV is preferred by 18 percent of the guests.

Other in-room television services—automated check-out (15 percent), hotel events channel (13 percent), bill review (12 percent) and room service via guestroom television (ten percent)—are used by less than 20 percent of the guests. LH







LODGING INDUSTRY CENSUS

National occupancies climb despite more than 100,000 new hotel rooms.

UNITED STATES

TOTAL U.S.	1989	1990
Properties	26,507	27,928
Rooms	2,876,104	2,979,143
Revenues	$58,100,000,000	$61,700,000,000*
Average Rate	$57.86	$58.76
Occupancy	63.56%	64.8%

*Projected

Source: Smith Travel Research

SOUTH ATLANTIC

	TOTAL	% OF NATIONAL
Properties	6,177	22.12
Rooms	728,301	24.45
STATE	**PROPERTIES**	**ROOMS**
Delaware	104	7,279
Washington, DC	102	24,515
Florida	2,170	290,129
Georgia	731	97,254
Maryland	424	45,932
N. Carolina	1,179	98,105
S. Carolina	453	54,614
Virginia	853	95,709
W. Virginia	161	14,764

MIDDLE ATLANTIC

	TOTAL	% OF NATIONAL
Properties	2,375	8.50
Rooms	278,808	9.36
STATE	**PROPERTIES**	**ROOMS**
New Jersey	443	59,507
New York	1,137	137,623
Pennsylvania	795	81,678

WEST SOUTH CENTRAL

	TOTAL	% OF NATIONAL
Properties	2,357	8.44
Rooms	302,327	10.15
STATE	**PROPERTIES**	**ROOMS**
Arkansas	335	27,257
Louisiana	311	48,598
Oklahoma	292	31,700
Texas	1,419	194,772

EAST SOUTH CENTRAL

	TOTAL	% OF NATIONAL
Properties	1,683	6.03
Rooms	175,844	5.90
STATE	**PROPERTIES**	**ROOMS**
Alabama	375	38,690
Kentucky	369	37,755
Mississippi	221	23,350
Tennessee	718	76,049

EAST NORTH CENTRAL

	TOTAL	% OF NATIONAL
Properties	3,590	12.85
Rooms	354,469	11.90
STATE	**PROPERTIES**	**ROOMS**
Illinois	859	105,300
Indiana	385	44,758
Michigan	832	74,856
Ohio	722	81,645
Wisconsin	792	47,910

Source: Smith Travel Research

NEW ENGLAND

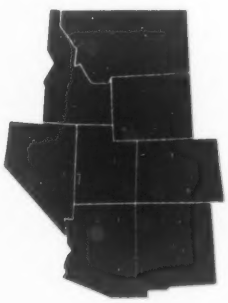
	TOTAL	% OF NATIONAL
Properties	1,528	5.47
Rooms	125,123	4.20
STATE	**PROPERTIES**	**ROOMS**
Connecticut	239	23,201
Maine	281	15,630
Massachusetts	514	54,801
New Hampshire	205	12,713
Vermont	241	13,834
Rhode Island	48	4,944

WEST NORTH CENTRAL

	TOTAL	% OF NATIONAL
Properties	2,450	8.77
Rooms	192,844	6.47
STATE	**PROPERTIES**	**ROOMS**
Iowa	383	27,811
Kansas	335	24,637
Minnesota	495	42,601
Missouri	487	56,498
Nebraska	439	20,864
N. Dakota	124	9,476
S. Dakota	187	10,957

MOUNTAIN

	TOTAL	% OF NATIONAL
Properties	2,926	10.48
Rooms	314,642	10.56
STATE	**PROPERTIES**	**ROOMS**
Arizona	544	63,499
Colorado	673	63,380
Idaho	150	11,149
Montana	243	14,971
Nevada	410	93,940
New Mexico	291	24,977
Utah	378	26,473
Wyoming	237	16,253



PACIFIC

	TOTAL	% OF NATIONAL
Properties	4,842	17.34
Rooms	506,785	17.01
STATE	**PROPERTIES**	**ROOMS**
Alaska	142	10,385
California	3,316	348,443
Hawaii	315	67,173
Oregon	587	37,391
Washington	482	43,393

Source: Smith Travel Research